Batch Processing Documents
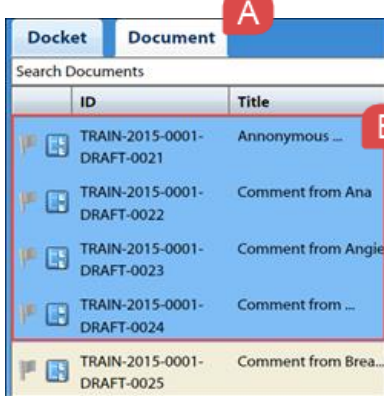## Quick Reference Guide

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Batch Processing Locations

Batch Processing functionality gives you the ability to process multiple documents at the same time. Batch Processing can be performed from different locations: **Document tabs** from all the Menu Options, **Document Search Results**, **Docket Tree** and the **Duplicates Tree**.

Homepage Menu Options and Search Results

You can select multiple documents from the Search Results or the following Menu options: **Inbox**, **FR Feed**, **My Favorites**, **Recently Viewed** and **Flagged Documents**.

Figure 1: Selecting Multiple Documents

Figure 2: Multiple Document Selection

(A) From the desired menu option, click on the Document tab.

(B) Use the following windows **hotkeys** to select multiple documents from the Document list.

❖ CTRL + A to select all the documents.

❖ CTRL + click on the desired documents to selectively highlight multiple documents.

❖ Multiple documents can also be selected by using SHIFT + up or down arrow.

Note: When more than one document is selected, the **Multiple Document Selection** window displays on the right as shown in Figure 2.

(C) The number of documents selected is displayed at the top of the screen.

(D) Click the **Change Title** check box to batch update the title of the selected documents.

(E) Users have an option to **Copy**, **Post** or **Re-Assign** selected documents by clicking on the respective radio buttons.

(F) Selected documents can be added to or removed from the Favorites List – OR – they can also be flagged or unflagged.

Note: Only one radio button can be selected at a time.

(G) Click the **Submit** button to initiate the batch job.

(H) Select **OK** in the **Confirm the Requested Changes** pop-up window. A message stating that **Your Request has been submitted** is displayed at the top of the screen (not shown here).
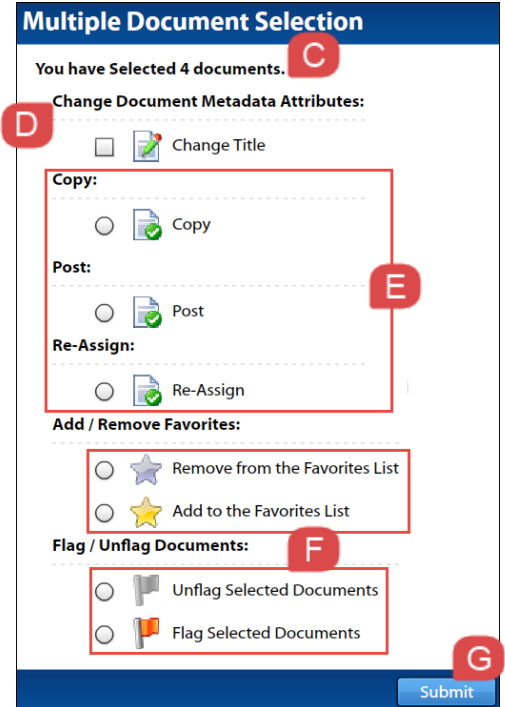
Docket Tree and Duplicates Tree

You can batch process from within the Docket Tree by selecting a Documents folder (e.g. Pending Post folder) or by selecting multiple documents from within a Documents folder. Batch Processing can also be done in the Duplicates Tree by selecting multiple documents from within a cluster folder.

(A) To access the Docket Tree, click the 🖳 icon (not shown here).

(B) Select the desired Documents folder. Multiple documents can also be selected from within a folder by using windows hotkeys as explained above.

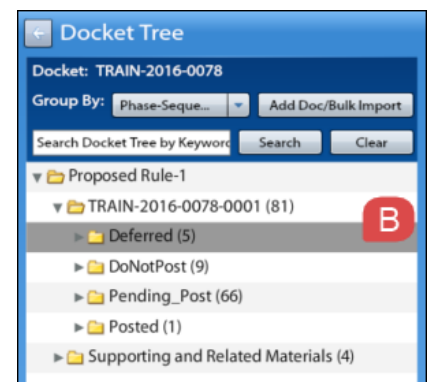(C) The **Document List** and **Batch Options** tabs display on the right panel as shown in Figure 4.

Figure 3: Selecting a Documents folder

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Batch Options in Docket Tree and Duplicates Tree Continued …

Note: When multiple documents are selected, the Batch Options screen appears as shown in Figure 4.

(D) Click on the **Batch Options** tab.

(E) The number of documents selected is displayed at the top of the screen.

(F) Document metadata Attributes (Status and Title) can be changed on the documents selected.

(G) To batch post documents in the selected status folder, click the **Post** radio button. Users also have the option to batch **Copy** or **Re-Assign** selected Documents.

Note: Copy and Re-Assign options will prompt users to identify the destination folder and Assignee respectively.

(H) The selected documents can be added to or removed from the Favorites list – OR – flagged or unflagged.

Note: You can select one radio button or multiple checkboxes.

(I) once the desired Batch Optoin(s) is selected, click the **Submit** button to initiate the batch job.

(J) Click **Ok** on the **Confirm the Requested Changes** pop-up window to confirm submission of the **Batch Job** (not shown here).

Figure 4: Batch Options tab

Batch Jobs

The **Batch Jobs** link is located at the top of the screen lets you view the status of your batch requests in the Batch Tree.

Figure 5: Batch Tree is displayed on the left

(A) The most recent batch job submitted appears at the top of the Batch Tree.

(B) Click on the sub folder to view the contents on the right (not shown here).

(C) Click on a batch job to view the **Job Details** on the right.

Note: The Job title displays the date and type of batch request submitted.

(D) The **Job Details** displays the type of batch job at the top of the screen.

(E) The first section of the **Job Details** displays the date and time when the job was requested, started and completed.

(F) The next section displays the type of batch job.

(G) The **Results** section displays the number of documents that were successfully processed or skipped.

Figure 6: Job Details